

ESTATE TAX LIQUIDITY INSURANCE DISCUSSION PROMPTS



THE DEATH BENEFIT OF A LIFE INSURANCE POLICY IS GENERALLY FEDERAL INCOME TAX-FREE

for the beneficiary. In instances where an heir needs to pay estate tax upon receiving an inheritance, life insurance proceeds can be used to partially or completely offset the tax without having to liquidate valuable assets. Using life insurance as part of a financial plan can provide a safeguard to loved ones who will be left behind.

Is your estate subject to federal and/or state-level estate or inheritance taxes? If yes, how will your heirs pay those taxes?

Would you consider funding future estate tax obligations today by leveraging premium payments to create a potentially significant death benefit?

If you're already using life insurance to help fund future estate taxes, when was the last time your strategy was reviewed?



DON'T LEAVE YOUR LEGACY TO CHANCE

Contact us to review your plan, identify potential gaps, and design solutions to help preserve your legacy for generations to come.

